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# **SURVEYING EDUCATIONAL INTERESTS OF OLDER ADULTS**

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**Part II - How-To-Manual**





# **SURVEYING EDUCATIONAL INTERESTS OF OLDER ADULTS**

## **Part II - How-To-Manual**



Submitted by:

EDUCATIONAL SURVEY COMMITTEE

- NEW HORIZONS -

CALGARY



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## INTRODUCTION

When it became obvious that senior citizens were changing in their attitudes towards leisure-time education, and that few, if any, schools and colleges had documented information on which to organize and offer such service, a group of concerned Calgarians did something about it.

With preliminary assistance from Mount Royal College, they developed plans to conduct a scientific survey and sampling of seniors' interests in educational projects for their newly-acquired leisure time. With solid financial help from the federal government's New Horizons Program they put the plan into motion.

They employed a knowledgeable professional consultant to co-ordinate the operation, set up committees to handle various phases of the project and organized and trained volunteer interviewers. Finally, they compiled the mass of data which, when computerized, gave some new slants on the present-day educational aspirations of senior citizens.

They also produced this handbook which should be a valuable tool for educators and senior citizens' organizations alike. Results of the Calgary survey by themselves could be used as a basis for developing courses by educational institutions and seniors' drop-in centres, or the handbook may be used as a "Do-It-Yourself" guide for conducting an up-to-the-minute survey of the current hopes, demands and needs of the seniors in a particular area.

As the Calgary survey has shown, the elder citizens of Canada are keeping up with the times and their attitudes towards leisure-time education are constantly changing.



## ORGANIZING A COMMUNITY SURVEY

Calgary's pioneer Seniors' Educational Survey required many more months than any other similar project should ever need. After several preliminary discussions it was evident that a practical survey was needed and that it could be conducted by senior citizens themselves if they had professional help. It was also obvious that it could become an interesting and absorbing project, but that it would need adequate funding.

A board of directors was formed to carry out the plan and several meetings were held to draw up a proposal to present to New Horizons with a request for funding. With Board Chairperson Mrs. Betty Brehaut leading the campaign it received a warm response from New Horizons which then gave formal approval and funds to carry out the proposal. Miss Kathryn Logsdail of Mount Royal College was then employed as consultant, researcher and "Girl Friday" for the project - and the survey proper was under way.

That is the point at which most future surveys should start, since the experiences of the Calgary pioneers, as outlined in this report, should make full-time professional help unnecessary. (See Appendix A)

To begin, a board of directors should be formed of approximately 10 dedicated volunteers who will be willing and able to make a commitment to the project and follow it through. They must be ready to become seriously involved and be consistent in their attendance at the many meetings that will become

necessary. A chairman and secretary should be selected at the beginning, with the latter keeping complete minutes of every session.

To make it easier for volunteers to attend meetings on a regular basis, make arrangements for a permanent location at which to meet.

First step must be to set up a committee to compile the questionnaire on which the survey is to be based. The pioneer Calgary group had to start from scratch and it took many meetings and much discussion to arrive at the Questionnaire that is included in this manual. (See Appendix B)

It was felt that the questionnaire should not only find out the needs and desires of those already committed to further education, but should also prod others who were not already involved to take a closer look at available opportunities. Also, the questionnaire had to be simple enough to be run through by the volunteer interviewers and completed in a reasonable time by the respondents.

Because the survey was primarily interested in finding out how many seniors would be interested in taking "Senior Courses" if they were readily available, questions concerned with "Who You Are" were kept few and simple. It was felt that many questions concerning past education, finances, health and living conditions would draw a reaction of "It's none of your business" -- and that is something that should be avoided.

The Calgary questionnaire was pre-tested at two Fall Teas sponsored by the Lifelong Learning Centre at Mount Royal College to introduce their Fall program. As a result of this, several questions were simplified or eliminated. Two minor changes, adding questions concerning "Unmet Needs" and "Weekend Activities" were later added. Other modifications, dictated by local conditions or situations, may be helpful if added to the sample Calgary Questionnaire when further surveys are undertaken.

#### OBTAINING INTERVIEWERS

In Calgary, a letter-sized poster was designed, outlining the need for volunteer interviewers, indicating that training would be provided and giving a telephone number to contact. (See Appendix C) It was distributed to local newspapers, radio and TV stations, volunteer centres and some educational institutions as well as notice boards in shopping centres. Greatest advertising success came from radio announcements of the project, including our telephone numbers for listeners to contact if interested further.

Personal contact by the Training Committee was also made with directors of volunteers at auxiliary hospitals, senior citizens' lodges, apartments and drop-in centres. Directors of social work courses at universities and colleges were also approached about the possibility of students acting as interviewers and thus gaining valuable experience in talking with older adults.



## TRAINING INTERVIEWERS

As discovered in Calgary, interviewing can be both challenging and fun. Training can be done in a little more than a two-hour workshop session. (See Appendix D)

Here is a typical workshop agenda, led by members of the Training Committee and with the interviewers taking part:

Welcome and introductions.

Description of what the survey is all about.

General guidelines and procedures (See below).

Step by step review of the questionnaire.

Practice by pairing off as interviewers and respondents.

And wind it up with coffee and goodies.

The interview itself can be an interesting and pleasant experience for both the person conducting the interview and the senior citizen being interviewed.

Set up the interview in advance and explain the purpose of the project:  
We are a group of older adults who want to find out what you really want to learn now that you are older, not just what colleges and other groups think you want.

Here are some guidelines:

Introduce yourself by name, show friendliness and respect, address the person being interviewed by name -- and be attentive.

At the beginning, explain that all answers to the questionnaire will be confidential and anonymous. No name will be attached to it, only a number to keep track of the number of persons interviewed. The interview has nothing to do with the government.

Know each question, and the specific purpose behind it.

Ask every question on the questionnaire and ask them in the order they are written and exactly as they are written.

Give positive responses to the respondent. "I see, "I understand" or a nod of the head are acceptable and neutral responses. Don't give biased responses such as "That's right", "Good" or "I agree".

Don't wander away from the questionnaire. One half hour should be enough to complete an interview. In the pioneer Calgary survey they averaged 25 minutes each.

#### WHO DO YOU INTERVIEW?

In a large urban area especially, it is a physical impossibility to interview everyone -- or even every senior citizen. However, professional poll-takers and other organizations have developed, through long experience, some proven and well-established procedures for taking samples that will reflect the thinking of the entire group. The procedures followed by Kathryn Logsdail, consultant in the Calgary survey, is recognized as giving 95 per cent assurance that the results, are correct in showing what ALL senior citizens think in the community.

Here's the formula:

Multiply the total population by .0025, add .9975 and divide that total into the total population.

In the case of Calgary, with a total of 36,360 senior citizens to be sampled (the figure based on the city's corporate systems records which in turn were based on the 1981 civic census) the formula worked out at: .0025 times 36,360 plus .9975 which equalled 91.8975. That was then divided into 36,360 with the answer indicating that 396 persons should be interviewed to give a 95 percent accurate sampling.



Experience, however, has shown that for every six people interviewed there should be an additional four to account for those who do not wish to complete the survey, complete it incorrectly or otherwise call it off before completion. Since Calgary needed 396 completed interviews to make the survey effective, the target was set at 660. However, a total of 470 interviews were completed, more than were actually needed.

As the city of Calgary covers a wide area, and it would not be desirable to concentrate the survey in one district, further steps were taken to assure that the sampling would be random in scope.

Using community population figures again based on the civic census, and on the formula that indicated that one in every 90 seniors should be interviewed, the total area of the city was divided into areas in each of which 12 to 15 interviews should be conducted.

That figure was adopted because experience and research has shown that an interviewer can comfortably conduct 12 to 15 interviews before his own bias begins to creep into the picture.

The next step was to zero in on individuals, and that was done through contact with the many groups and organizations that, through their own activities in specific areas, have some personal knowledge of the seniors in their neighbourhood. Again, when lists of prospective respondents were drawn up, random selections of the names were made.

Where possible, each interviewer was given an interview area with which he was familiar. Major traffic routes were considered to cut down travel time. (See Appendix E)

## COMPILING THE RESULTS

After the actual interviewing is completed there is still a major job to be tackled: the compiling of all the information given in the answers to the questions in the questionnaire.

In the pioneer Calgary project, arrangements were made to use a computer to analyse the information. That meant coding all the answers in accordance with the computer system that was available. (See Appendix F)

To do the job, a group of volunteers gathered to transfer information from the questionnaires onto coding sheets. The system was explained by the project consultant and coding sheets were provided. At first the system seemed to be awkward, but speed came quickly and very soon there was enthusiasm and anticipation. A full afternoon was spent on the job, with a break for an enjoyable afternoon tea. Like the rest of the project, it was a new and enjoyable experience for the volunteers.

When the coding was completed, the information was ready for analysis by computer -- the climax of the near -- completed project. Some of the information that came from the analysis confirmed what many individuals had expected from the start, but much came as a real shock even to those who had thought they were very close to the problems of senior citizens.

## GETTING THE RESULTS

When all the information obtained by the questionnaires was fed into the computer in the pioneer survey, the first step was to obtain a broad picture of the Seniors' Community in Calgary.

Here is what was learned:

### INITIAL FINDINGS OF EDUCATIONAL INTEREST OF OLDER ADULTS

#### Who We Interviewed

470 Calgarians from all parts of the city of Calgary.

26% (124) male  
73% (344) female  
1% ( 2) did not state their sex.

#### How Old They Were

29% 55-64 years old  
33 65-69 " "  
19 70-74 " "  
19 74 + " "

#### Where They Lived

53% house  
27 apartment  
10 lodge/nursing home  
6 multiple dwelling  
4 auxillary hospital/mobile home



How Long They Lived in Calgary

12%	0-6 years
30	6-25 "
30	26-40 "
28	more than 40 years

How Long at Current Address

42%	0-6 years
40	6-25 "
16	26-40 "
2	more than 40 years

Language Spoken

94%	English
2	French
1	German
1	Slavic
2	other

Learning Opportunities

Enrolled in courses since age 55

52%	yes
44	no
4	did not state

Importance of Learning New Skills at this Point in Time

48%	Moderate
-----	----------

Why?

44%	stimulation
27	health
7	financial situation

Why Pursue New Interests

- 66% to keep mind active
- 49 to learn something new
- 45 to keep body active
- 43 to meet people
  
- 7 to earn extra income

What Encourages One to Take a Course

- 49% course offered in location close to home
- 34 course furthering a new interest
- 30 to go with a friend

Does Current Level of Education Interfere with Involvement in New Learning Opportunities Now?

- 76% no
- 16 yes
- 8 did not state

A report of the complete project can be obtained by contacting the Alberta Council on Aging and asking for a copy of the Calgary Survey of Educational Interest of Older Adults.

DETAILED ANALYSIS

The next step was to analyse all the replies in detail to get a complete picture of the hopes and interests of the senior citizens of the community. Here is an example of what was found:

Table comparing age, by living with whom, by sex. - in percentage terms

MALE

LIVING WITH WHOM

<u>AGE</u>	<u>ALONE</u>	<u>SPOUSE</u>	<u>OTHERS</u>
55-64	10%	73%	17%
65-69	17	83	0
70-74	25	65	10
> 74	12	69	19

FEMALE

<u>AGE</u>	<u>ALONE</u>	<u>SPOUSE</u>	<u>OTHERS</u>
55-64	21%	60%	19%
65-69	50	40	10
70-74	55	28	17
> 74	57	16	27

Table comparing level of optimism by whether or not respondents had enrolled in courses since age 55.

<u>OPTIMIS</u>	<u>YES, ENROLLED</u>	<u>NO, HAVEN'T ENROLLED</u>
1. lo optimis	43%	57%
2. medium optimis	52	48
3. high optimis	69	31



## USING THE SURVEY RESULTS

The main objective of a community survey is to provide information about programs and projects for decision making. Therefore, distributing the information obtained in the survey is important. Several effective ways of using survey results are outlined below. The purpose is to obtain wide spread awareness and understanding of the survey findings. This becomes the basis for community and/or group action.

- 1) Present the summarized findings to the persons involved initially in the survey. This includes the people who helped in designing and distributing the questionnaire, in coding, and summarizing the findings. A meeting could be held where major findings are presented and questions answered. Give copies of the report to each participating community organization.
- 2) Hold a town meeting. Invite interested citizens and representatives of the various organizations. This type of meeting must be well organized, and could be promoted through mass media, letters and personal contact.
- 3) Seek the cooperation of the local mass media to publicize.
- 4) Give a series of presentations (15 to 20 minutes) at meetings of individual community organizations. Form teams of individuals to develop and present the findings. Community groups could make use of survey results when planning their yearly program.
- 5) Distribute short summaries (two to four pages) of the most important findings on a mass basis to community residences. Another alternative is to limit the summary to a particular topic such as recreation.

Finally, a few general comments:

- 1) it is vital that the individuals filling out questionnaires not be identified with their answers, the confidentiality of the respondents responses must be maintained,
- 2) sufficient background information should be presented to ensure accurate interpretation of responses to survey questions. Key leaders should be given an opportunity to react before the information is generally released.

Information from the pioneer project was presented to local communities, the senior population, and professionals, both locally and nationally.

The following methods were chosen:

- 1) News and feature release media articles were prepared by the Educational Survey Committee and sent to all local media services;
- 2) Radio interviews were conducted by individual committee members.
- 3) A series of four community meetings was held; one in each quadrant of the city of Calgary to relay information and determine what should be done next. (See Appendix G - Agenda for - Community Meeting)
- 4) One meeting of professional educators and municipal and provincial government personnel was held to relay survey findings, relay feedback from the four community meetings, and to determine what should be done next. The agenda was similar to that of the community meetings.
- 5) A local, provincial and national mailing list was developed to inform and make available for purchase, the survey report and/or manual to interested organizations, government departments and institutions. The list included:

public libraries, educational institutions, senior centres, Associations on Gerontology, Adult Education, Medical and Nurses Associations.

- 6) An exhibit was planned and manned by four committee members at the annual Alberta Council on Aging conference. Copies of the questionnaire were made available, plus information on who to speak to and how to obtain detailed results of the survey.





## APPENDIX A

### ORGANIZING A COMMUNITY SURVEY





## APPENDIX A

### ORGANIZING A COMMUNITY SURVEY

The pioneer project began with a community meeting. A letter was sent out to 25 older persons in the Calgary community who were either known to be interested in later life learning or who were active, community minded individuals. Two additional inserts, describing learning needs and thoughts on learning, were enclosed with the letter to encourage participant thinking about learning. (See an invitation letter to community meeting.)

The first meeting brought together 20 older adults. An agenda for this meeting included introductions, the reason for the meeting, and an approach to obtain information on what educational programs should be made available and how. (See agenda)

From this initial discussion a second meeting was called at which time a board self-elected itself and made a decision to write a proposal to obtain funding for this project. The source of funding was New Horizons, Health and Welfare Canada. Regional offices of New Horizons are very helpful in assisting groups to get started and in writing proposals. Attached please see a list of office addresses and personnel.

INVITATION LETTER TO COMMUNITY MEETING

Dear \_\_\_\_\_,

\_\_\_\_\_ and myself of the Lifelong Learning Centre for Older Adults are very pleased with the interest and enrolment in our first year of courses and workshops offered to older adults in the Calgary community.

Part of our goal for the centre is to identify unmet learning needs of older adults and to develop programs and services to meet these needs.

Success of the Lifelong Learning Center and the types of programs offered depends on advice from older adults as to what their needs are and how they can best be satisfied.

We wish to share ideas on learning needs in a meeting of interested adults from the Calgary community. The meeting will be held on Friday, \_\_\_\_, from 10 a.m. to 12 noon in the \_\_\_\_\_ (state location).

We look forward to talking with you. If you have any questions or are unable to attend, please call us at \_\_\_\_\_ (insert telephone number).

Thank you for your interest.

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Signature)

## LEARNING NEEDS

Dr. Howard McClusky (University of Michigan), is a leader in the field of Psychology and Education for Older Adults. He has developed a scale of functional needs that when met, facilitate a more enriched life for the older adult. Education can play a significant role in satisfying these needs. He discusses the following four need areas:

1. Coping Needs: Skills needed to cope with changing life circumstances. These needs may include learning in the following areas:

- a. 3 'R's (reading, writing, computation)
- b. Physical needs (nutrition, exercise)
- c. Economic self-sufficiency
- d. Legal, housing and leisure needs

Examples of courses to meet coping needs

- Communication skills
- Coping with bereavement
- Cooking course
- Knowing about services

2. Expressive Needs: Skills to enhance the enjoyment of an activity for its own sake.

Examples of courses to meet expressive needs

- Music
- Travel
- Astrology

3. Contributive Needs: Skills to facilitate the need to contribute something acceptable to others and the community.

Examples of courses to meet contributive needs

- Peer counselling skills
- Volunteering
- Tutoring opportunities



4. Influence Needs: Skills to strengthen the ability of older persons to exert greater influence on their circumstances of living and the world around them.

Examples of courses to meet influence needs

- Public speaking
- Creative writing
- Pollution

McClusky states that a person must first satisfy their basic needs before moving on to higher levels of need. For example, a course on astrology is not likely to interest someone needing more adequate nutrition or housing.

We wish to spend some time talking about needs and possible ways to satisfy them in our meeting together.

## THOUGHTS ON LEARNING

Happiness at any age is more akin to or synonymous with learning than it is with anything else. (Dr. Aker, Department Head of Adult Education Florida State University)

Lifelong Learning means

- self directed growth
- understanding yourself and the world
- acquiring new skills and powers - the only true wealth which you can never lose
- investment in yourself (R. Gross, The Lifelong Learner, 1977)

Plato: The most rewarding and significant learning that can take place cannot occur until a person has lived 50 years or more. Until a person has lived enough life and experienced enough of its meaning - in terms of its depths, joys and tragedies - he cannot really appreciate the more significant problems of man. He is not able to understand with any level of significant meaning the depth of human experience.

COMMUNITY MEETING AGENDA

TIME:

DATE:

PLACE:

ORDER OF BUSINESS:

- 1) INTRODUCTION OF HOST AND BRIEF DESCRIPTION OF PHOLSOPHY AND GOALS OF LIFELONG LEARNING CENTRE FOR OLDER ADULTS.
- 2) SELF-INTRODUCTIONS BY PARTICIPANTS, TO INCLUDE, IF APPROPRIATE: SPECIAL INTERESTS IN THE COMMUNITY, SPECIAL INTERESTS IN LIFELONG LEARNING.
- 3) SMALL GROUP DISCUSSION: a) WHAT LEARNING OPPORTUNITIES SHOULD BE AVAILABLE?  
b) WHO SHOULD THEY BE AVAILABLE TOO?
- 4) REFRESHMENTS
- 5) SUMMARY OF SMALL GROUP DISCUSSION
- 6) HOW WILL WE MAKE THEM AVAILABLE? THE FIRST STEP.
- 7) THE BROADER VISION
- 8) WHERE DO WE GO FROM HERE?

GUEST-SPEAKER/HOW NEW HORIZONS CAN HELP

AJOURNMENT

LUNCH

NEW HORIZONS OFFICES

**Regional Offices**

**British Columbia**

New Horizons Program  
Main Floor  
1525 West Eighth Avenue  
Vancouver, British Columbia V6J 1T5  
Tel. (604) 732-4303

**Alberta Yukon, Northwest Territories**

New Horizons Program  
203 Financial Building  
10621 - 100 Avenue  
Edmonton, Alberta T5J 0B3  
Tel. (403) 420-2754

**Saskatchewan**

New Horizons Program  
4th Floor  
Federal Building  
1975 Scarth Street  
Regina, Saskatchewan S4P 3K4  
Tel. (306) 359-5355

**Manitoba**

New Horizons Program  
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Bestlands Building  
191 Pioneer Street  
Winnipeg, Manitoba R3C 3N7  
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Toronto, Ontario M4P 1E4  
Tel. (416) 481-5183

**Quebec**

New Horizons Program  
South Tower, Room 1022  
P.O. Box 93  
Postal Station Desjardins  
Montreal, Quebec H5B 1B2  
Tel. (514) 283-7306

**New Brunswick**

New Horizons Program  
2nd Floor  
Norwich Union Building  
100 Cameron Street  
Moncton, New Brunswick E1C 5Y6  
Tel. (506) 388-7007

**Nova Scotia**

New Horizons Program  
Halifax Insurance Building  
5670 Spring Garden Road  
Halifax, Nova Scotia B3J 1H6  
Tel. (902) 426-2741

**Prince Edward Island**

New Horizons Program  
Dominion Building  
97 Queen Street  
Charlottetown, P.E.I. C1A 4A9  
Tel. (902) 892-6587

**Newfoundland**

New Horizons Program  
Room 602  
Humphrey Gilbert Building  
P.O. Box 5580  
St. John's, Newfoundland A1C 5W4  
Tel. (709) 753-1761

**National Office**

New Horizons Program  
Health and Welfare Canada  
6th Floor  
Brooke Claxton Building  
Tunney's Pasture  
Ottawa, Ontario K1A 1B5  
Tel. (613) 996-8358

The New Horizons proposal format includes the following items:

- 1) New Horizons project title. For this a group must come up with a title which describes the project they wish to undertake.
- 2) Name and address of group
- 3) Name and address of President
- 4) Whether or not the group has been active before.
- 5) Whether or not New Horizons contributions have been given to this group before.
- 6) The number of participants expected to be involved in this project.
- 7) The number of retired persons expected to be involved in the project.
- 8) A description of the project. This section asks for a description of the need for the project, the objectives, and the way to go about meeting the objectives or the methodology.
- 9) Finally, a budget.

Under project description; need, refers to why the survey or project is being done. Objectives then describe what is to be accomplished. Methodology describes how it will be accomplished. And finally budget, how much will it cost? The educational survey project also included a time line so that we would know how long each activity or objective would take to complete.

New Horizons funding, for example, is dependent upon senior adults planning and implementing a project of their own choosing. In order to ensure that this project was meeting the criteria for New Horizons, a role clarification for both the board, (senior adults in the project) and the consultant, (resource



person for this project was prepared), to sort out separately what each would be responsible for. The attached proposal describes the educational survey committee proposal.

The project committee was provided with much valuable advice and assistance from the New Horizons representative throughout the preparation of this proposal. When it was completed and approved by the local representative it was then forwarded to Ottawa for final approval. Having obtained approval to go ahead, the board held meetings to construct a questionnaire which would find out what the educational needs or interests of older adults in the Calgary area were, and what would encourage or prevent a person from becoming involved in Later Life Learning opportunities. In order to come up with the final questionnaire a draft questionnaire was prepared by the resource consultant and presented to a committee from the board. This committee reviewed the questionnaire and made several changes so that the final questionnaire instrument would contain only items dealing specifically with learning opportunities. Please see the attached questionnaire.

NEW HORIZONS PROPOSAL

1. New Horizons Project Title \_\_\_\_\_
2. Name and Address of Group \_\_\_\_\_
3. Name and Address of President \_\_\_\_\_
4. Group Active Before \_\_\_\_\_
5. Contributions Before \_\_\_\_\_
6. Number of Participants \_\_\_\_\_
7. Number of Retired Persons \_\_\_\_\_

## 8. Describe your New Horizons project

### Need

Documented information on learning needs of older adults in the Calgary community is non-existent. Both the Senior Citizen's Central Council and the majority of co-ordinators of educational programs for older adults list needs assessment as a top priority issue. This project would both address this need locally, plus enable other communities to assess their needs by following the instructions of the manual. Results of this project will create the data base necessary for the development of comprehensive educational service planning for Calgary's older adults.

### Objectives

1. To determine learning needs of older adults in the Calgary community.
2. To develop a manual which details the process involved in assessing needs.
3. To determine a format to promote dissemination of the survey results and manual to interested professionals and communities.

### Methodology

The needs assessment portion of this project will involve; identification of target population, drafting a needs assessment instrument, critiquing it with interested professionals and pre-testing it in the community,

screening, orienting and training senior volunteer interviewers and interviewing the sample defined. Analysis of data gathered will yield identification of older adult learning needs.

Development of the manual will involve recording in detail the events and process of assessing learning needs. It will include what 'worked best for us', at each phase of the project. A manual will be drafted, critiqued and the final document produced.

[illegible]



## BUDGET

### 9. Number of months that this budget covers - 18

A	Office supplies, postage, etc.	\$	1100.
B	Rent for offices, meeting halls, etc.	\$	0
C	Maintenance, utilities, telephone (long distance phone)	\$	100.
D	Furniture and equipment	\$	0
E	Supplies for arts and crafts, etc. (purchase of video)	\$	500.
F	Renovation costs	\$	0
G	Other expenses (specify) principal research consult. interviewer honorarium	\$	15600. (12 months) 850.
Support service costs: orientation and training		\$	100.
word processing			
computer data analyst			
computer time			
extensive library service			
office equipment			
meeting space, security		\$	1750.
postage			
local telephone			

Total amount of funding requested from New Horizons \$ 20000.

## OTHER INCOME

### 10. Sources of income other than New Horizons

A	Other sources of income	N.A.
B	Estimated income from project	

Total amount of income

## CONTINUITY

### 11. Possible sources of support after the New Horizons contribution terminates

- A Donations  
Need not determined at this time.
- B Grants
- C Other

### BOARD ROLE CLARIFICATION

The Board of Directors of this project is responsible to the concept of assessing learning needs of older adults in the Calgary community.

The initial concept developed from a group of older adults who have discussed this issue at length. Deliberations resulted in identifying the need to obtain information on learning needs from the broader community. (See project description.) Appropriate facilities and personnel became available to undertake this investigation at this time and so a New Horizons project is being proposed.

The board of directors is responsible for:

1. design of the overall scenario.
2. design and approval of the assessment instrument.
3. design and approval of selection criterion for senior volunteer interviewers.
4. design and approval of senior volunteer interviewer training package.
5. approval of logistics for the senior volunteer interviewer training session.
6. advertising, interviewing and selection of senior volunteer interviewers.
7. execution of training and orientation of senior volunteer interviewers.
8. implementation of the pre-test procedure.
9. review of pre-test results and re-assessment of strategy and design.
10. ensuring that the board be available to volunteer interviewers who may experience concerns arising from the interviewing process.

11. review of results of incoming data and presentation of recommendations to research consultant.
12. edit of draft report.
13. conducting an evaluation session to review above process as a discussion section for the 'how-to' manual.
14. draft 'how-to' manual.
15. edit and production of final copy of manual.

CONSULTANT ROLE CLARIFICATION

The principal research consultant is responsible to the Board of Directors of this project. This board has formed to conduct research to ascertain the educational needs of older adults and to compile a 'How-To', manual for adoption of the above process by other community groups.

The principal research consultant is responsible for:

1. providing appropriate background material to the board to assist the decision-making process throughout the various stages of the project.
2. developing a proposal to describe the board's deliberations and intentions regarding this research, to include process and time lines for completion of work activities.

With the advice and approval of board members, the principal research consultant will undertake the following tasks:

3. develop a learning needs assessment questionnaire.
4. develop a selection criterion format describing preferred characteristics of potential volunteer interviewers.
5. compile a training package for orientation and training of volunteer interviewers.
6. organize the logistics of the training session for volunteer interviewers.
7. plan the pre-test procedure.
8. define the sample to be interviewed, prepare the interview schedule and resolve time and transportation concerns of interviewees.

9. analyze the pre-test results and report to board for a decision on whether or not the strategy and design of the assessment requires revision.
10. respond to concerns expressed by board members through volunteer interviewers with respect to interviewing the community.
11. tabulate and analyze incoming data from the assessments.
12. present results to the board for review and recommendation.
13. prepare a summary report.
14. edit report and review draft conclusions with board members.
15. act as a resource to board toward developing a manual which documents methodology of assessing learning needs.



TASKS	BOARD RESPONSIBILITY	CONSULTANT RESPONSIBILITY
Needs Assessment	literature review develop proposal draft instrument selection criteria training package advertising logistics advert., interview select interviewers train interviewers plan pre-test implement pre-test review pre-test board available define sample interview analyze results review results draft report review draft final report	Advisor " " " " " " Executive " " Advisor Executor Executor Advisor Executor Advisor "
Manual	resource to manual evaluate process draft manual edit and final copy	Resource " " " " " " Resource " " Executor Resource Executor Resource Executor Resource/Executor



## APPENDIX B

### QUESTIONNAIRE GUIDELINES



## APPENDIX B

### QUESTIONNAIRE GUIDELINES

If your project intends to investigate different objectives than the ones covered by the educational survey committee, then you may want to select new questions or modify questions in this questionnaire. The following are some guidelines to keep in mind when adding your own questions or formulating a new questionnaire for a specific project.

Refer to the list of objectives which have been made to define the project and the kind of information that is needed from these objectives when selecting question ideas and topics. Keep the question specific and restricted to those fulfilling the purpose of the survey. Remember that any questionnaire must be limited in length and scope. Generally, it should not take the person answering more than 15 to 20 minutes to complete the questionnaire. Below is a set of criteria to help evaluate questions chosen and to make revisions on them. For each question written, the following can be asked:

- 1) Does the question relate to one idea? If there was more than one idea use more than one question.
- 2) Is there a simpler or more direct way to ask the question? Try to keep the question under 20 words, and try to limit the number of complex concepts contained in any one question. Generally, don't use words having three or more syllables unless it is certain that they will be familiar to respondents.



- 3) Are there confusing words in the question? Check for words that may be unfamiliar to the respondents or that may have more than one meaning or pronunciation. If there is uncertainty about a word and how it might be interpreted, various people should be asked for their interpretations.
- 4) Are there words or phrases that are likely to influence a persons responses in a way not central to the issue? For example, some words make people nervous, such as, "should teachers forbid...". A better way to ask the question is "should teachers require...".
- 5) Is the question asked negatively? For example, would you prefer not to take part in the program? Negative questions sometime confuse respondents and the negative word may be overlooked. Try to state the question in positive terms. If it is decided that the question must be stated negatively call attention to the negative word by underlining it.
- 6) Is the question loaded? Does it encourage one answer or discourage another? If the question seems to suggest a right or wrong answer, change it. Example, are we likely to improve the program very much by spending just a little more money?

A manual which the Pioneer Educational Survey Committee found most helpful, can be obtained through Advanced Education and Manpower Planning Secretariat of the Province of Alberta. The booklet is titled, A Community Survey Handbook, and gives a very detailed course of instruction in conducting surveys. The address is Devonian Building, 11160 Jasper Avenue, Edmonton, Alberta, T5K 0L1.

CALGARY SURVEY OF EDUCATIONAL INTEREST  
OF OLDER ADULTS  
(QUESTIONNAIRE)

SURVEY NUMBER: \_\_\_\_\_

LOCATION IN CITY (COMMUNITY): \_\_\_\_\_

SEX OF RESPONDENT: 1. ☐ Male

2. ☐ Female

TYPE OF RESIDENTIAL DWELLING: 1. ☐ Single House  
2. ☐ Semi-detached  
3. ☐ Row House  
4. ☐ Low-rise Apartment  
5. ☐ Hi-rise Apartment  
6. ☐ Seniors Apartment  
7. ☐ Lodge/Nursing Home  
8. ☐ Room & Board  
9. ☐ Other, Specify \_\_\_\_\_

COMMENTS: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

INTERVIEWER: \_\_\_\_\_

Sponsored By:

EDUCATIONAL SURVEY COMMITTEE  
NEW HORIZONS PROJECT,  
CALGARY, ALBERTA

WHO YOU ARE

1. Age

1. \_\_\_\_ 55 - 59
2. \_\_\_\_ 60 - 64
3. \_\_\_\_ 65 - 69
4. \_\_\_\_ 70 - 74
5. \_\_\_\_ 75 - 79
6. \_\_\_\_ 80 - 84
7. \_\_\_\_ 85 plus

2. How long have you lived in Calgary?

1. \_\_\_\_ 0 - 1 year
2. \_\_\_\_ 2 - 5 years
3. \_\_\_\_ 6 - 15 years
4. \_\_\_\_ 16 - 25 years
5. \_\_\_\_ 26 - 40 years
6. \_\_\_\_ 41 - 60 years
7. \_\_\_\_ 61 years plus

3. How long have you lived at your current address?

1. \_\_\_\_ 0 - 1 year
2. \_\_\_\_ 2 - 5 years
3. \_\_\_\_ 6 - 15 years
4. \_\_\_\_ 16 - 25 years
5. \_\_\_\_ 26 - 40 years
6. \_\_\_\_ 41 - 60 years
7. \_\_\_\_ 61 years plus

4. With whom do you currently live?

1. ☐ alone
2. ☐ spouse
3. ☐ child
4. ☐ relative(s)
5. ☐ friend(s)
6. ☐ other(s) specify \_\_\_\_\_

5. Which language do you speak most comfortably?

1. ☐ English
2. ☐ French
3. ☐ German
4. ☐ Italian
5. ☐ Slavic
6. ☐ Chinese
7. ☐ Other, specify \_\_\_\_\_

WHAT YOU DO

6. If you visit a senior centre, in what type of activities do you mostly participate? Check all that apply.

1. ☐ meals
2. ☐ recreation
3. ☐ socializing
4. ☐ counselling/information
5. ☐ health care
6. ☐ classes
7. ☐ tours
8. ☐ other, specify \_\_\_\_\_
9. ☐ not applicable

7. If you met new friends in Calgary in the last year, where did you meet them?

1. ☐ Senior Citizens' Centre
2. ☐ new neighbours
3. ☐ through the church
4. ☐ through memberships in organizations, specify \_\_\_\_\_  
\_\_\_\_\_
5. ☐ educational courses
6. ☐ YW/YMCA
7. ☐ through family or existing friends
8. ☐ other, specify \_\_\_\_\_
9. ☐ not applicable

8. A) What hobbies and forms of recreation were you involved in before age 55?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_ not applicable

8. B) Currently, if different from above?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_ not applicable



9. A) Assuming good health, sufficient finances, available transportation, etc., what interests, hobbies, or skills would you like to pursue in the future?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_ not applicable

9. B) For what reasons?

01. \_\_\_ to challenge myself  
02. \_\_\_ to learn something new  
03. \_\_\_ to meet people  
04. \_\_\_ to keep active - mind  
05. \_\_\_ - body  
06. \_\_\_ - soul  
07. \_\_\_ to earn extra income  
08. \_\_\_ entertainment  
09. \_\_\_ to satisfy my curiosity  
10. \_\_\_ to assist other people  
11. \_\_\_ other, specify \_\_\_\_\_  
12. \_\_\_ not applicable

10. A) If you could have pursued an occupation other than the one(s) you did, what would it (they) have been?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_ not applicable

\_\_\_\_\_ would not have pursued an occupation other than the one(s)  
I did.

LEARNING OPPORTUNITIES

11. A) Have you enrolled in any courses since age 55?

1. \_\_\_yes

2. \_\_\_no

If yes, please list:

	Column A
_____	
_____	
_____	
_____	

11. B) From the list above how satisfied were you with these courses?

Record in Column A: 1 - high

2 - moderate

3 - little satisfaction

C) If you recorded "little satisfaction", please state reason(s):

1. \_\_\_could not hear instructor

2. \_\_\_material presented too quickly

3. \_\_\_material presented below/above my level of understanding

4. \_\_\_room too hot/cold

5. \_\_\_course description did not match content

6. \_\_\_instructor not well prepared

7. \_\_\_course poorly delivered

8. \_\_\_other, specify \_\_\_\_\_

9. \_\_\_not applicable

12. What were the most important learning experiences in your life?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_ not applicable

13. A) How important is learning new skills at this point in your life?

1. \_\_\_ high
2. \_\_\_ moderate
3. \_\_\_ little importance

13. B) For what reason?

1. \_\_\_ health
2. \_\_\_ age
3. \_\_\_ financial situation
4. \_\_\_ societal/technological changes
5. \_\_\_ stimulation
6. \_\_\_ too busy
7. \_\_\_ have other more pressing concerns, specify \_\_\_\_\_  
\_\_\_\_\_
8. \_\_\_ other, specify \_\_\_\_\_

14. What would most encourage you to take a course?

01. \_\_\_ have a friend suggest one
02. \_\_\_ go together with a friend
03. \_\_\_ read about course in paper
04. \_\_\_ a course furthering a new interest
05. \_\_\_ be invited to an introductory "Open House"
06. \_\_\_ be involved in the planning of courses
07. \_\_\_ receive written information
08. \_\_\_ go in a group
09. \_\_\_ have course offered in location close to my home
10. \_\_\_ not interested
11. \_\_\_ other, specify \_\_\_\_\_

15. If transportation were no problem, the cost affordable, and the time of the course convenient, which of the following programs would you be seriously interested in taking? Check all that apply.

LEARNING ABOUT YOURSELF

Personal Development Subjects:

- 1 -Looking Your Best
- 2 -Stress Management
- 3 -Effective Speaking
- 4 -Getting To Know Yourself
- 5 -Confidence & Competence
- 6 -Exploring your Dreams
- 7 -Learning For Living
- 8 -What else?

Life Transitions:

- 1 -Retirement
- 2 -Pre-Retirement Planning
- 3 -Health Disabilities
- 4 -Hearing Impairment
- 5 -Workshop for Widowed Persons
- 6 -Human Aging
- 7 -Death, Dying & Beyond
- 8 -Friendships
- 9 -What else?

Health Related Issues:

- 1 -Diet
- 2 -Arthritis Self Management
- 3 -Exercise to Music
- 4 -Aquacises
- 5 -Yoga
- 6 -Relaxation & Meditation
- 7 -Holistic Health & Wellness
- 8 -Living with Diabetes
- 9 -What else?

Religion, Spiritual Development:

- 1 -Buddhist Philosophy & Retired Life
- 2 -Bible Study
- 3 -Comparative Religion
- 4 -What else?

### LEARNING ABOUT THE WORLD

#### Training For Volunteer Or Community Services:

- 1 -Learning How to Work with People
- 2 -Leadership Skills
- 3 -Foster Grandparents
- 4 -What else?

#### Consumer Education:

- 1 -Handling Finances
- 2 -Good Buymanship
- 3 -Pension Benefits
- 4 -Metric
- 5 -Wills and Estates
- 6 -What else?

#### Community Affairs:

- 1 -How Government Works
- 2 -World Resources
- 3 -Energy
- 4 -Twentieth Century History & You
- 5 -What else?

#### Training For A New Job For Full-time, Part-time or Volunteer:

- 01 -Typing
- 02 -Upholstery
- 03 -Switchboard - Receptionist
- 04 -Broadcasting
- 05 -Business Administration
- 06 -Early Childhood Services & Development
- 07 -Interior Design
- 08 -Journalism
- 09 -Community Recreation
- 10 -Therapeutic Recreation
- 11 -Leisure Facilities Operations
- 12 -Medical Office Assistant
- 13 -Music
- 14 -Justice Administration
- 15 -Rehabilitation Services
- 16 -Secretarial Skills
- 17 -Accounting, Bookkeeping
- 18 -Social Service Careers
- 19 -Speech
- 20 -Petroleum Land Management
- 21 -Public Relations
- 22 -Computer Science
- 23 -Word Processing
- 24 -Volunteer Visiting
- 25 -Organizational Skills for Voluntary Agencies
- 26 -Basic Treasurer's Skills for Voluntary Agencies
- 27 -Interview Skills
- 28 -What else?

### LEARNING TO LEARN

#### Basic Education Or Upgrading:

- 1 -Reading
- 2 -Writing
- 3 -Mathematics
- 4 -What else?

#### How To Learn More Effectively:

- 1 -Improving Your Memory
- 2 -Listening Skills
- 3 -What else?

#### Cultural Enrichment:

- 1 -Literature
- 2 -Creative Drama
- 3 -Lecture Series
- 4 -Philosophy
- 5 -History
- 6 -Travelogues
- 7 -Psychology
- 8 -Foreign Languages,  
which ones \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- 9 -What else?



LEARNING TO LEARN (Con't)

Art:

- 1 -Collages
- 2 -Drawing
- 3 -Painting
- 4 -Water Color
- 5 -Sculpture
- 6 -Art Appreciation

7 -What else?

Home Arts:

- 1 -Cooking for One or Two
- 2 -Canning Techniques
- 3 -Refurnishing the Home
- 4 -Flower Arranging
- 5 -Fashion & Fabric Shows

6 -What else?

Gardening:

- 1 -Vegetable Growing
- 2 -Mini-Gardening
- 3 -Rose Culture
- 4 -Lawn Care
- 5 -Use of Pesticides, Fertilizers
- 6 -What else?

Arts, Crafts, Hobbies:

- 1 -Collecting
- 2 -Fix-It-Shop
- 3 -Leather Working
- 4 -Silver Working
- 5 -Wood Working
- 6 -Christmas Workshop
- 7 -Ceramics
- 8 -Photography
- 9 -What else?

Music:

- 1 -Choral Singing
  - 2 -Music Therapy
  - 3 -Music Appreciation
  - 4 -Concert Series
  - 5 -Playing a Musical Instrument
- which ones \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

6 -What else?

Fabric Arts:

- 1 -Sewing
- 2 -Embroidery
- 3 -Crewel Work
- 4 -Knitting
- 5 -Needlepoint
- 6 -Rug Hooking
- 7 -Smocking
- 8 -Fabulous Faces - Nylon Sculpture

9 -What else?

Practical Problems:

- 1 -Law for the Layman
- 2 -Small Business Operation
- 3 -Employment Consultation Service
- 4 -Car Repair
- 5 -House Maintenance
- 6 -Defensive Driving
- 7 -Safety in the Home
- 8 -Computer

9 -What else?

16. If any courses were made easily available in those areas on the above list, what cost do you consider reasonable for 20 hours of instruction?

1. \_\_\_ free
2. \_\_\_ \$ 1.00
3. \_\_\_ \$ 5.00
4. \_\_\_ \$10.00
5. \_\_\_ \$15.00
6. \_\_\_ \$20.00
7. \_\_\_ \$25.00
8. \_\_\_ over \$25.00 to actual cost
9. \_\_\_ actual cost

17. A) Do you feel that your current level of education interferes with taking part in learning opportunities now?

1. \_\_\_ yes
2. \_\_\_ no

17. B) If yes, why?

1. \_\_\_ need to improve reading and writing skills
2. \_\_\_ feel underqualified
3. \_\_\_ uncomfortable speaking in public
4. \_\_\_ been away from school too long
5. \_\_\_ do not understand registration, etc.
6. \_\_\_ other, specify \_\_\_\_\_
7. \_\_\_ not applicable

18. Would any of the following reasons likely prevent you from attending programs?

- 01. \_\_\_no transportation
- 02. \_\_\_dislike going out at night
- 03. \_\_\_shyness
- 04. \_\_\_sickness or other physical limitations, specify \_\_\_\_\_
- 05. \_\_\_cannot leave other person(s) alone
- 06. \_\_\_language barrier
- 07. \_\_\_not close to home
- 08. \_\_\_too busy with other activities
- 09. \_\_\_inappropriate times
- 10. \_\_\_poor concentration
- 11. \_\_\_financial situation
- 12. \_\_\_not interested
- 13. \_\_\_other, specify \_\_\_\_\_

19. If you had a choice, with whom would you like to share the activities you enjoy?

- 1. \_\_\_with people your own age
- 2. \_\_\_with younger people mainly
- 3. \_\_\_with people of all ages
- 4. \_\_\_cannot participate in activities, specify reason \_\_\_\_\_
- 5. \_\_\_by myself, without other people

20. If a course of interest were offered, where would you prefer to attend?

- 01. ☐ Mount Royal College
- 02. ☐ S.A.I.T.
- 03. ☐ University of Calgary
- 04. ☐ Local church, specify \_\_\_\_\_
- 05. ☐ YM/YWCA, specify \_\_\_\_\_
- 06. ☐ Senior Citizens' Apartment, specify \_\_\_\_\_
- 07. ☐ Community centre, specify \_\_\_\_\_
- 08. ☐ Home Study - TV
- 09. ☐ - Radio
- 10. ☐ - Correspondence course
- 11. ☐ Home study groups
- 12. ☐ Senior centre, specify \_\_\_\_\_
- 13. ☐ Teleconference at local learning centre
- 14. ☐ Senior citizens' home (lodge, nursing home) specify \_\_\_\_\_
- 15. ☐ other, specify \_\_\_\_\_
- 16. ☐ not applicable

21. What time of day would be most convenient for you to attend classes?

- 1. ☐ morning
- 2. ☐ noon
- 3. ☐ afternoon
- 4. ☐ late afternoon (5 to 7 P.M.)
- 5. ☐ evening
- 6. ☐ not applicable

22. What months of the year would you prefer for attending classes?

- |                                       |                                     |   |
|---------------------------------------|-------------------------------------|---|
| 01. <input type="checkbox"/> January  | 05. <input type="checkbox"/> May    | 09. <input type="checkbox"/> September      |
| 02. <input type="checkbox"/> February | 06. <input type="checkbox"/> June   | 10. <input type="checkbox"/> October        |
| 03. <input type="checkbox"/> March    | 07. <input type="checkbox"/> July   | 11. <input type="checkbox"/> November       |
| 04. <input type="checkbox"/> April    | 08. <input type="checkbox"/> August | 12. <input type="checkbox"/> December       |
|                                       |                                     | 13. <input type="checkbox"/> not applicable |

23. How long would you prefer classes to run?

1. \_\_\_ one-day workshop (weekday/Saturday/Sunday)
2. \_\_\_ once a week for 4, 6, 8, 10, 12, 14 weeks (circle one)
3. \_\_\_ twice a week for 4, 6, 8, 10 weeks (circle one)
4. \_\_\_ five times a week for 1, 2, 3 weeks (circle one)
5. \_\_\_ live-in workshop (2 to 3 days midweek/weekend)
6. \_\_\_ not applicable

24. What would be the best method to inform you and/or your friends about upcoming learning opportunities for older adults?

1. \_\_\_ local radio/T.V., specify \_\_\_\_\_
2. \_\_\_ daily newspaper, specify \_\_\_\_\_
3. \_\_\_ posters in churches, drop-in centres, apartments
4. \_\_\_ mail-out brochures
5. \_\_\_ Good Times
6. \_\_\_ Calgary Mirror
7. \_\_\_ hand-out at check-out counters in grocery Stores
8. \_\_\_ other, specify \_\_\_\_\_
9. \_\_\_ not applicable

25. How would you travel to class?

1. \_\_\_ car
2. \_\_\_ public transit
3. \_\_\_ walk
4. \_\_\_ taxi
5. \_\_\_ handibus
6. \_\_\_ other, specify \_\_\_\_\_
7. \_\_\_ not applicable



26. Do you have any problems getting around the city in the winter or in the summer?

	Winter	Summer
1. illness		
2. weather		
3. no private transportation		
4. too expensive		
5. poor bus service		
6. other, specify		

7. not applicable

27. What do you see as the most important role(s) of learning opportunities for older adults today?

1. \_\_\_ a way to meet people and make new friends
2. \_\_\_ personal satisfaction and enjoyment
3. \_\_\_ a means to acquire information on services and rights
4. \_\_\_ re-training for new careers
5. \_\_\_ to keep people busy
6. \_\_\_ to deal with age related issues
7. \_\_\_ upgrading
8. \_\_\_ to improve personal development skills
9. \_\_\_ other, specify \_\_\_\_\_
10. \_\_\_ not important

28. Do you believe that you have good, fair or little understanding of the concerns of

GOOD      FAIR      LITTLE

1. people of your own age group
2. people of your children's age
3. the youngest generation?


(Please check )  
appropriate box

29. What do you see as the greatest unmet needs as they relate to older adults? Check all that apply.

1. \_\_\_ financial assistance
2. \_\_\_ health service
3. \_\_\_ legal counselling
4. \_\_\_ recreational programs
5. \_\_\_ home help
6. \_\_\_ friendships
7. \_\_\_ educational programs
8. \_\_\_ transportation
9. \_\_\_ housing
10. \_\_\_ tips on dealing with aging
11. \_\_\_ telephone reassurance
12. \_\_\_ counselling/information
13. \_\_\_ weekend activities
14. \_\_\_ other, specify \_\_\_\_\_
15. \_\_\_ not applicable

30. A) Do you have any specialized area of knowledge or skill that you would like to share?

1. \_\_\_ yes
2. \_\_\_ no

B) Specify skill: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
not applicable \_\_\_\_\_

C) If your answer is yes, would you prefer to share your skill on an individual or group basis?  
1. \_\_\_ individual  
2. \_\_\_ group

31. Would you be interested in becoming involved in new learning opportunities for older adults by
1. \_\_\_ planning
  2. \_\_\_ teaching
  3. \_\_\_ counselling
  4. \_\_\_ attending
  5. \_\_\_ not applicable

THOUGHTS ABOUT YOUR LIFE

	Agree	Disagree	?
32. As I grow older, things seem better than I thought they would be.			
33. I expect some interesting and pleasant things to happen to me in the future.			
34. I have made plans for things I'll be doing a month or a year from now.			

THANK YOU FOR YOUR PARTICIPATION IN THIS PROJECT.



APPENDIX C

INTERVIEWER ADVERTISEMENT





## **EDUCATIONAL INTERVIEWERS**

---

Interested in Lifelong Learning & What It Means to Calgary's Older Adult Population?

We require 30 - 35 Senior Volunteer Interviewers to conduct personal interviews with older adults in Calgary.

Orientation and training provided. Interviews Oct. 12 - 31st.  
Follow-up social for interviewers.

Contact Margaret at 269-3863, Bette at 245-2357  
or Kathryn at 240-6010.

New Horizons Project, Mount Royal College





APPENDIX D

TRAINING INTERVIEWERS



## APPENDIX D

### TRAINING INTERVIEWERS

The following instructions were given to interviewers during their orientation session to assist them in administering the questionnaire.

#### INTERVIEWER INSTRUCTIONS

The purpose of the survey is to find out what it is that you want to learn in your adult years.

The result is the questionnaire that you have in front of you.

If you are interested, I will go through the questionnaire with you now.

On the first page, the survey number has been filled in. This number is to help us keep track of the number of questionnaires completed.

Location in city - is asking you to fill in the community area or street that you live on. All of your answers are confidential and anonymous. No one can trace your replies back to you. This is important so that you may feel free to answer questions truthfully. We are interested in which community you live in so that we may be sure to reach all parts of the city.

Sex - self-explanatory.

Type of Residential Dwelling - circle which one now applies to you.

If after you have completed this survey you wish to say something more or comment on the questions themselves, then please use this comments section to do so.



The questionnaire is divided into three parts:

- (1) a brief - who you are
- (2) followed by - what you do
- (3) final section to discuss - learning opportunities.

Take your time and with each question put a tick next to the answer which seems most appropriate for you or fill in your own response if none of the suggestions apply.

If you have any questions as you go through it, please ask.

Would you prefer to have me record your responses for you?

APPENDIX E

WHO DO YOU INTERVIEW



## APPENDIX E

### WHO DO YOU INTERVIEW

After the orientation session interviewers were each given a list of random names in an area close to where they lived. Letters were sent to each person on the list describing the survey project and stating that an interviewer would be getting in contact with them in the near future to set up a convenient time to conduct the interview. (See Letter to Interviewees)

It was not possible in the city of Calgary to come up with a complete list of every individual 65 years of age and over. In order to reach people who would represent the larger population of older adults in Calgary an approach was made to church groups, senior citizen centres, senior citizen apartments, persons in lodges and nursing homes, persons who were both active in the community and who were isolated in the community, so that we would get a cross section of people from all walks of life of 55 years of age and over. In total there were 30 interviewers, each interviewing in a different area of the city of Calgary. A list of 30 names was given to each interviewer in anticipation that approximately 15 in each area could be reached and interviewed. However, some interviewers had more success than others in locating their prospective interviewees and in encouraging them to speak with them. The interviewing took place during October, November and January. Originally, interviewing was to be completed during the first two months. However, increased interest in the project developed over time and so the board held a third orientation session towards the beginning of January and a third group of interviewers ventured out to complete the remainder of the surveys. In total, interviewers completed 470 usable questionnaires.

LETTER SENT TO PROSPECTIVE INTERVIEWERS

October 15, 1982

Today there is no record as to what older adults want in the way of learning opportunities.

Up to now, universities, colleges, schools, churches, community clubs, seniors' drop-in centres, etc. have always made available what they think we want.

We are trying to ascertain what it is that older adults really want, so that we can tell the institutions what to make available for us.

We are a group of older adults who are interested in learning opportunities in the later years. We became organized and are now sponsored by New Horizons to conduct a research survey.

The purpose of the survey is to find out what it is that you want to learn in your adult years. The questionnaire takes about 25 minutes to complete.

We have involved interested people from the Calgary community to assist us in the interviewing.

An interviewer will be phoning you to arrange a convenient time.

We appreciate your interest in our project and thank you for giving it your consideration.

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Betty Brehaut,  
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## APPENDIX F

### COMPILING THE RESULTS





## APPENDIX F

### COMPILING THE RESULTS

Due to both the number of questions and the number of persons interviewed it was decided to use a computer system to analyze the results. Surveys of this nature are often analyzed on a packaged program titled Statistical Package for Social Services. To prepare the information from the questionnaire in a fashion that would be adaptable to the computer system all of the answers had to be recoded onto coding sheets in a numbered fashion. Presented here is the actual coding format used for the questionnaire described earlier. Instructions which were presented to the coding committee to prepare them for the coding procedure also follow.

#### Coding Instructions

1. Fill in survey number on all four coding sheets.
2. Ignore the following questions.

8a

8b

9a


10a

11 - list of courses

12

30b

They will be coded at a later date in a different manner.

3. Questions on code sheets in heavy black squares  should be coded by placing the number next to the answer in the box.

Example 1. Age

1. \_\_\_\_\_ 55 - 59  
2. \_\_\_\_\_ 60 - 64  
3.   X   65 - 69  
4. \_\_\_\_\_ 70 - 74

3
Age

4. Question 15 - (listing of courses) should be coded by adding up all of the replies for each section and recording that figure.

Example Basic Education or Upgrading

- ① Reading  
2. Writing  
③ Mathematics  
4. What else?

2
Basic Education

A section for which there have been no responses would be coded as 0.

Example Basic Education or Upgrading

1. Reading  
2. Writing  
3. Mathematics  
4. What else?

0
Basic Education

5. All remaining questions are to be coded by placing a ( ✓ ) in each square that corresponds to a reply on the questionnaire.

All other squares are to be left blank.



WHO YOU ARE

1. Age

1.      55 - 59
2.      60 - 64
3.   X   65 - 69
4.      70 - 74
5.      75 - 79
6.      80 - 84
7.      85 plus

2. How long have you lived in Calgary?

1.      0 - 1 year
2.      2 - 5 years
3.   X   6 - 15 years
4.      16 - 25 years
5.      26 - 40 years
6.      41 - 60 years
7.      61 years plus

3. How long have you lived at your current address?

1.      0 - 1 year
2.   X   2 - 5 years
3.      6 - 15 years
4.      16 - 25 years
5.      26 - 40 years
6.      41 - 60 years
7.      61 years plus

4. With whom do you currently live?

1. ☐ alone
2. ☒ spouse
3. ☐ child
4. ☐ relative(s)
5. ☐ friend(s)
6. ☐ other(s) specify \_\_\_\_\_

5. Which language do you speak most comfortably?

1. ☒ English
2. ☐ French
3. ☐ German
4. ☐ Italian
5. ☐ Slavic
6. ☐ Chinese
7. ☐ Other, specify \_\_\_\_\_

WHAT YOU DO

6. If you visit a senior centre, in what type of activities do you mostly participate? Check all that apply.

1. ☐ meals
2. ☒ recreation
3. ☒ socializing
4. ☐ counselling/information
5. ☐ health care
6. ☒ classes
7. ☐ tours
8. ☐ other, specify \_\_\_\_\_
9. ☐ not applicable



7. If you met new friends in Calgary in the last year, where did you meet them?

1. ☒ Senior Citizens' Centre

2. ☐ new neighbours

3. ☐ through the church

4. ☒ through memberships in organizations, specify \_\_\_\_\_

5. ☒ educational courses

6. ☐ YW/YMCA

7. ☐ through family or existing friends

8. ☐ other, specify \_\_\_\_\_

9. ☐ not applicable

8. A) What hobbies and forms of recreation were you involved in before age 55?

\_\_\_\_\_  
CROCHETING, KNITTING

\_\_\_\_\_  
HEALTH SPA

\_\_\_\_\_  
not applicable

8. B) Currently, if different from above?

\_\_\_\_\_  
OIL PAINTING

\_\_\_\_\_  
not applicable

9. If transportation were no problem, the cost affordable, and the time of the course convenient, which of the following programs would you be seriously interested in taking? Check all that apply.

LEARNING ABOUT YOURSELF

Personal Development Subjects:

- ① -Looking Your Best
- 2 -Stress Management
- 3 -Effective Speaking
- ④ -Getting To Know Yourself
- ⑤ -Confidence & Competence
- 6 -Exploring your Dreams
- 7 -Learning For Living
- 8 -What else?

Health Related Issues:

- ① -Diet
- 2 -Arthritis Self Management
- ③ -Exercise to Music
- 4 -Aquacises
- ⑤ -Yoga
- 6 -Relaxation & Meditation
- ⑦ -Holistic Health & Wellness
- 8 -Living with Diabetes
- 9 -What else?

Life Transitions:

- 1 -Retirement
- ② -Pre-Retirement Planning
- 3 -Health Disabilities
- 4 -Hearing Impairment
- 5 -Workshop for Widowed Persons
- 6 -Human Aging
- ⑦ -Death, Dying & Beyond
- 8 -Friendships
- 9 -What else?

Religion, Spiritual Development:

- 1 -Buddhist Philosophy & Retired Life
- 2 -Bible Study
- 3 -Comparative Religion
- 4 -What else?

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1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
1	3	9	8	0	6	2	5	3	3	2	2	1			✓	✓			✓
CARD NUMBER	SURVEY NUMBER	LOCATION IN CITY	SEX	TYPE OF DWELLING	AGE	LENGTH OF TIME IN CALGARY	LENGTH OF TIME AT CURRENT ADDRESS	CURRENTLY LIVING WITH WHOM	LANGUAGE SPOKEN	HAIR CARE	MEALS	RECREATION	SOCIALIZING	COUNSELLING INFORMATION	HEALTH CARE	CLASSES			

21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40
			✓				✓												
TOURS	OTHER	NOT APPLICABLE	SENIOR CITIZENS CENTRE	NEW NEIGHBOURS	CHURCH	MEMBERSHIP IN ORGANIZATIONS	EDUCATIONAL COURSES	YW/YMCA	FAMILY OR FRIENDS	OTHER	NOT APPLICABLE	CHALLENGE MYSELF	LEARN SOMETHING NEW	MEET PEOPLE	KEEP ACTIVE - MIND	KEEP ACTIVE - BODY	KEEP ACTIVE - SOUL	EARN EXTRA INCOME	ENTERTAINMENT

41	42	43	44	45															
SATISFY CURIOSITY	ASSIST OTHER PEOPLE	OTHER	NOT APPLICABLE	COURSE ENROLLMENT	COULD NOT HEAR INSTRUCTOR	MATERIAL PRESENTED QUICKLY	ROOM TOO HOT/COLD	COURSE DESCRIPTION/CONTENT	INSTRUCTOR NOT PREPARED	COURSE POORLY DELIVERED	OTHER	NOT APPLICABLE	IMPORTANCE OF LEARNING	HEALTH	AGE	FINANCIAL SITUATION	SOCIETAL TECHNOLOGICAL CHANGE	STIMULATION	TOO BUSY

Q.13 B cont.

to

Q.14

61	62	63	64	65	66	67	68	69	70	71	72	73
MORE PRESSING CONCERNS	OTHER	HAVE FRIEND SUGGEST ONE	GO WITH A FRIEND	READ COURSE IN PAPER.	FURTHERING NEW INTEREST.	INVITATION TO 'OPEN HOUSE'.	INVOLVED IN PLANNING COURSE	RECEIVE WRITTEN INFORMATION	GO IN A GROUP	LOCATION CLOSE TO HOME	NOT INTERESTED.	OTHER.

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CALGARY, ALBERTA  
1983.



1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	
2	3	9	8	3	4	2	0	RELIGION	TRAIN. FOR VOLUNTEER	CONSUMER EDUCATION	COMMUNITY AFFAIRS	TRAIN. FOR NEW JOB	BASIC EDUCATION	HOW TO LEARN	CULTURAL ENRICHMENT	ART	HOME ARTS	GARDENING	ARTS, CRAFTS, HOBBIES	MUSK
21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	
FABRIC ARTS	PRACTICAL PROBLEMS	REASONABLE COST	CURRENT LEVEL EDUCATION INTERFERES	IMPROVE READING/WRITE SKILLS	FEEL UNDER-QUALIFIED	UNCOMFORTABLE SPEAKING IN PUBLIC	AWAY TOO LONG	DO NOT UNDERSTAND REGISTRATION	OTHER	NOT APPLICABLE	NO TRANSPORTATION	DISLIKE GOING OUT AT NIGHT	SHYNESS	SICKNESS	CANNOT LEAVE OTHERS ALONE	LANGUAGE BARRIER	NOT CLOSE TO HOME	TOO BUSY	INAPPROPRIATE TIMES	
41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	
POOR CONCENTRATION	FINANCIAL SITUATION	NOT INTERESTED	OTHER	NOT APPLICABLE	PEOPLE OWN AGE	YOUNGER PEOPLE MAINLY	PEOPLE OF ALL AGES	CANNOT PARTICIPATE	BY MYSELF	MOUNT ROYAL COLLEGE	S.A.I.T.	UNIVERSITY OF CALGARY	LOCAL CHURCH	YM/YWCA	SENIORS APT.	COMMUNITY CENTRE	HOME STUDY - T.V.	HOME STUDY - RADIO	HOME STUDY - CORRESPOND.	
61	62	63	64	65	66	67	68	69	70	71	72									
HOME STUDY - GROUPS	SENIOR CENTRE	TELECONFERENCE	SENIOR'S HOME	OTHER	NOT APPLICABLE	MORNING	NOON	AFTERNOON	LATE AFTERNOON	EVENING	NOT APPLICABLE									

Q. 15

Q. 15 CONT. TO Q. 18

Q. 18 CONT. TO Q. 20

Q. 20 CONT. TO Q. 21

Q. 21

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CALGARY, ALBERTA,  
1983.

When the coding was completed each questionnaire was again checked to the coding sheets to make sure that no errors occurred. Then the coding sheets were taken to a keypuncher and the information was taken from the coding sheets and keypunched onto computer cards to be fed into the computer system. The kinds of analysis that were completed, via the computer system, could have been done very easily by hand for a much smaller sample or to fewer questions.

First the computer added together all of the people who responded for each different question, for example, by adding together all of the males and all of the females we found that we spoke to 344 females and 124 males and two who decide not to respond to this question. This kind of analysis is termed frequency count, and we derived this information for every item on every question of the questionnaire. Once having obtained this information it was possible to look at the questionnaire and find out what further comparisons might prove significant. It was decided to compare frequency counts by sex, to separate male and female, by age groups, by persons who had taken courses after the age of 55 with those who had not, and by whether persons lived alone, with a spouse or with another person. The computer also converted all of the raw scores into percentages to get a picture of the different percentage amounts of interests shown for each question.

Manually, to do the same type of calculations, one would go through each questionnaire separately and, for example, add up all persons who answered yes to the same item and compare it to persons who answered no to that item. To further look at the same information, you could make two columns and for

example, find out how many women, versus how many men said yes to that same question. Again you would simply go through each questionnaire and put a tick on a blank piece of paper for each female saying yes or male saying yes. Percentage calculations can be computed by dividing the number that possesses a specific quality by the total number in the sample. Symbolically, the method computing the percentages is:

$$p = \frac{x}{n} \times 100$$

where  $p$  = a percentage,  $x$  = the number possessing the quality and  $n$  = the number of completed questionnaires.





APPENDIX G

COMMUNITY MEETING AGENDA



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APPENDIX G

COMMUNITY MEETING

AGENDA

WELCOME

INTRODUCTIONS

WHY - IMPORTANCE OF LATER LIFE LEARNING

HOW - WE GOT STARTED - DEVELOPMENT OF EDUCATIONAL SURVEY PROJECT

WHAT - WE FOUND OUT

WHAT - OUR GOALS FOR THE PROJECT WERE

REFRESHMENT BREAK

DISCUSSION - WHAT WOULD YOU LIKE TO SEE HAPPEN  
WHO WOULD BE RESPONSIBLE?

SUMMATION

THANK-YOU



## ACKNOWLEDGEMENTS

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Marjorie Smith, Vicki Weir, Elsie Jackson, Elsie Brown, Herta Przeczek, Doug Stewart, Terry Hutten, Olive Pogue, Marion Hansen, Terri Lamoureux, Marjorie McKnight, Olive Savage, Ken Marsh, Ella Mae Depp, Dorothy Farrell, Walter Chuckla

In addition, preliminary organization was conducted by Jeanne Schnell of Mount Royal College in Calgary and Kathryn Logsdail, consultant, researcher and co-ordinator throughout the project.





REFERENCES

Calgary Survey of Educational Interests of Older Adults - Part I Research Report (1983)

- Obtained through - Alberta Council on Aging,  
#324, 10010 - 105 Street,  
Edmonton, Alberta  
T5J 1C4

Community Survey Handbook, Advanced Education and Manpower Planning Secretariat of the Province of Alberta, 11160 Jasper Ave., Edmonton, Alberta, T5K 0L1

- New Horizons, Board of Directors Handbook,
- See Regional Office Addresses, Pg. 25.







